Reminder/Recall Process – Complete Program Guide

Preface

KYIR can be used to generate the information necessary to produce any vaccine series completion reminder/recall notices.

In order to get the most accurate data out of KYIR, the following MUST occur:

- All immunizations administered by your office must be recorded in KYIR.
- Your clinic's Patient Roster must be current. Programs should be closed for any and all patients no longer served by your clinic (instructions included in this guide). The Reminder/Recall process gets information from patients listed as Active on your Patient Roster. Keep your Patient Roster up to date to avoid including patients you no longer serve.
- All patient addresses and phone numbers in KYIR must be current. KYIR will produce mailing labels in Avery #5160 format, Dymo label machine format, a complete data report, and also an Excel spreadsheet for data uploads.
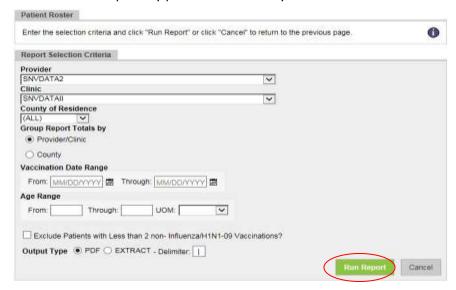
Overview Steps for a Complete Reminder/Recall Successful Program:

1. Verify all administered vaccines are entered into KYIR.
2. Verify completeness and correctness of patient demographical data in KYIR – addresses and phone numbers.
3. Clean-up your patient roster in KYIR and inactivate non-current patients.
4. Run the Reminder/Recall feature specifying the vaccines of your choice.
5. Mail reminders or place phone calls.
6. **Optional procedure to measure success:** Run Dosage Reports for the vaccines you chose with dates before and after this campaign to assess the program's success rate.

Section 1: How To Clean Up Your Patient Roster

The Patient Roster can be viewed by going the **Main Menu**, select **Reports**, go to the **Patient Management** section and choose **Patient Roster**. Always review the Patient Roster prior to running a Reminder/Recall and make Inactive any patients who have moved, are seeing a different provider, have not responded to previous reminders, or who have finished his/her vaccine series. This will prevent you from sending reminders to inactive patients.

The Patient Roster report indicates which patients are tied to your clinic in KYIR. In other words, you are listed as their primary provider where they receive immunizations.
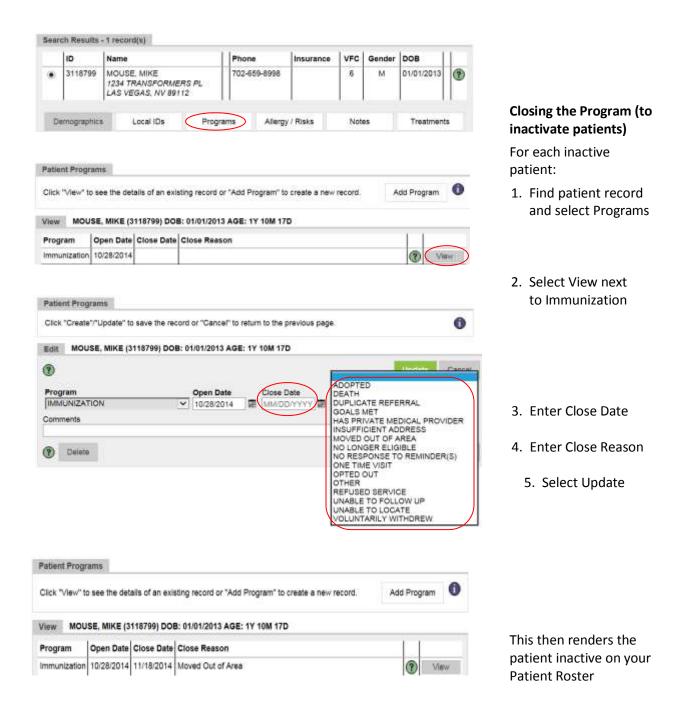

Run Patient Roster

1. Select Reports from the Main Menu
2. Under Patient Management, select Patient Roster Report
3. Enter criteria for patients you would like to send reminders to
4. Select Run Report

Note: Leave County as All as this will pull up all patients throughout the state still tied to your practice.

Review Patient Roster

1. Patient Rosters list both active and inactive Patients
2. Look through list of Active patients to find any that should be made Inactive:
   a. Patients who have moved
   b. Patients who do not respond to reminders
   c. Patients who have completed the vaccination series

Closing the Program (to inactivate patients)

For each inactive patient:

1. Find patient record and select Programs

2. Select View next to Immunization

3. Enter Close Date

4. Enter Close Reason

5. Select Update

This then renders the patient inactive on your Patient Roster

Complete the above steps for all patient records you wish to make inactive. This ensures that the Reminder/Recall report will only generate results for active patients, thereby saving time, money, and postage.

Once the Patient Roster is up to date, you are ready to create a Patient Reminder/Recall.
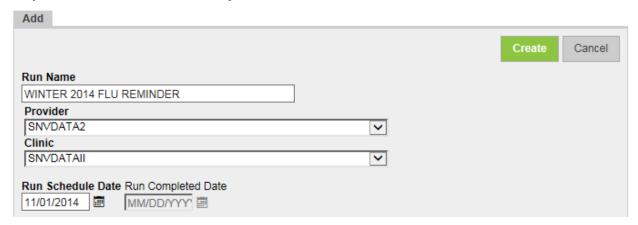
Section 2: Defining The Report Parameters For Your Current Reminder Campaign

Follow these steps to actually create a Reminder/Recall report:

Step 1: **To access the Reminder/Recall report, select Reports on the main menu bar, from the Patient Management section, select Patient Reminder/ Recall.**

Step 2: **To create a Reminder/Recall report, select the Add Reminder/Recall Run button located in the upper right corner of your screen.**

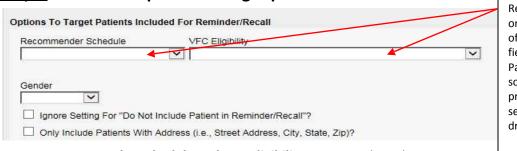**Step 3**: **Enter the criteria for your reminders.**

- **Run Name** is a required field used to describe the name of your reminder/recall run. For example, Infants and Toddlers February 2015 or Tdap Series July 2014 or All Vaccines January 2015.

- **Provider and Clinic** is the provider and clinic name the reminder/recall would run for. Use the drop down menu to select the appropriate provider and clinic for which you have security access to run reports.

- **Run Schedule Date** is the date this reminder/recall will be processed. This date is likely today's date or could be a date in the future. Do not enter a date in the past.

- **Run Complete Date** is a read-only field. An automated job is run the following morning at 2:00 a.m. This field will fill-in automatically with the date the run occurs.

Make sure to select if your UOM (Unit of Measure) for the age range specified is Months or Years.

- **Reminder/Recall Date Range (From)** represents the earliest date of vaccinations for the reminder/recall run. In a Reminder/Recall, only patients who are due for a vaccination on or after this date will be included in the results. For example, some patients may have an appointment to complete their vaccination series within a few days therefore you may want to use a minimum date in the near future, 10-15 days away so the system captures patients past due beginning in a few days. **(Through)** represents the cutoff date of vaccinations for the reminder/recall run. In a Reminder, only patients who are due for a vaccination on or before this date will be included in the results. In a Recall, only patients who are overdue for a vaccination as of this date will be included.

- **Age Range** is the minimum and maximum age (as of the reminder date) that the patient must be in order to be included in the reminder run.

- **UOM =** Unit of Measure for the above Age Range. You can specify either Months or Years.

Step 4: Check the options to target patients.

Do not specify Recommender Schedule or VFC Eligibility if your office does not use these fields located on the Patient Demographic screen. Non VFC providers will not even see the VFC Eligibility drop down field.

Options To Target Patients Included For Reminder/Recall

Recommender Schedule   VFC Eligibility

Gender

☐ Ignore Setting For "Do Not Include Patient in Reminder/Recall"?

☐ Only Include Patients With Address (i.e., Street Address, City, State, Zip)?

- **Recommender Schedule and VFC Eligibility** - see note box above.

- **Gender** use this field to narrow down the results by patient gender.

- **Ignore Setting for Do Not Include Patient In Reminder/Recall** – On the patient's Demographics screen, a user may check a box indicating the patient does not want to receive reminders. You may override this preference by checking this box. It is recommended to check this box especially for a public health emergency (i.e. outbreak of a vaccine preventable disease) since we want to remind all patients.

- **Only Include Patients With Address** is checked to limit a reminder/recall to only patients that have an address entered in KYIR. Patients that do not have a complete address (i.e. street. City, state and zip code) will not be included. Do not check this box if you want to include patients without an address entered into KYIR since each could be called or manually sent a reminder/recall.

Step 4: Con't

☐ Increment Patient Reminders/Recall Count?

☐ Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination

☑ Include Recommender Reminders/Recalls?

☑ Generate Reminder/Recall Event?

☑ Include Manual Reminders/Recalls?

☑ Include Patients Due For Vaccinations (Reminders)?

- **Increment Patient Reminder/Recall Count** is checked to allow a user to include this reminder/recall run when counting the number of reminders generated for a patient. The number of countable reminder/recalls is used to exclude patients with a certain number of reminder/recalls without a response (see next item). This option should be left unchecked when running a test or reminder/recall for informational or planning purposes.

- **Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination** is used by entering a number in this field. If previous reminders have been sent to patients and they have not come back, by entering the number of reminders a patient has previously been sent, will eliminate inclusion of those patients. Example: You have sent reminders/recalls to some patients two or three times and they have not come into the clinic for the needed vaccinations, by entering the number (2) or (3) in this field, you can eliminate them from inclusion in the reminder/recall run. Additionally, you may want to inactivate this patient from your patient roster. Refer to pages 1-2 on how to perform this function.

- **Include Recommender Reminder/Recalls** is checked to determine which patients to include, based on the current ACIP schedule programmed into KYIR. This box must be checked if the Generate Reminder Events box is checked (see next item).

- **Generate Reminder Events** is checked to generate and save an Event for each patient included in the reminder/recall. This may be viewed by going to the Events screen on the patient's record. This is nothing more than documentation and need not be checked for reminder/recalls to function properly.

- **Include Manual Reminder/Recalls** is checked to include patients who have had a manual Reminder Date indicated on their record. Reminder/Recalls can include patients identified by the recommender and/or patients who have had a manual reminder date indicated.

- **Include Patients Due For Vaccinations (Reminders)** is checked to include patients coming due for vaccinations. Patients will be included if they are due for one or more vaccinations during the period of time specified by the Minimum and Maximum Reminder Dates. Reminder/Recalls may target reminders coming due, recalls overdue, or both.

Step 4: Con't

☑ Include Patients Overdue For Vaccinations (Recalls)?

0   Minimum Number Of Days Past Due To Include   700   Maximum Number Of Days Past Due To Include

☐ Exclude Patients with Less than 2 non- Influenza/H1N1-09 Vaccinations?

☐ Exclude patients with one or more vaccine refusals?

- **Include Patients Overdue For Vaccinations (Recalls)** is checked to include patients who are overdue. Patients will be included if they are overdue for one or more vaccinations as of the minimum reminder date. Reminder/Recalls may target reminders coming due, recalls overdue, or both.

- **Minimum Number of Days Past Due To Include** is checked to limit the patients included in recalls by indicating a minimum number of days they must be overdue. For example, enter number 30 to indicate that patients must be at least 30 days overdue for inclusion in the reminder/recall. Leave the box blank or use 0 (zero) to indicate patients overdue as of the
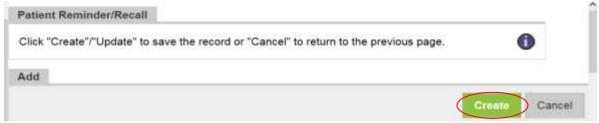
minimum reminder date for inclusion. <u>Entering 0 (zero) will include all patients overdue, regardless of how overdue they are.</u>

- **Maximum Number of Days Past Due To Include** needs a large number entered in this field. Generally, if a patient is one to two years past due for immunizations, they are not coming back. Entering 700 in this field would limit the maximum number of days past due to 700.

- **Exclude Patients with Less than2 non-Influenza/H1N1-09 Vaccinations?** checking this box would exclude anyone with only one (1) non-flu type vaccine.

- **Exclude patients with one or more vaccine refusals?** can be checked if you want to exclude anyone who has documented vaccine refusals on their patient record.

Step 5: Select the vaccines you want included in the reminder/recall run.

	Vaccine Series	Dose Number	
☐			
☐	DTaP/Td/Tdap		
☐	HEPA		
☐	HEPB		
☐	Hib		
☐	HPV		
☐	Influenza		
☐	Meningococcal		
☐	MMR/Measles		
☐	Pneumococcal		
☐	Polio		
☐	ROTA		
☐	Varicella(CPOX)		
☐	Zoster		

Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series)
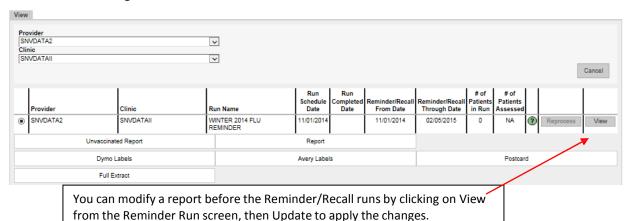
Vaccine Series and Optional Dose section is utilized to define the immunizations you want to include in the Reminder/Recall. Check the box(es) next to the vaccine series for which patients are to be reminded or recalled. To select all vaccines, check the box at the top of the column, left of Vaccine Series. Patients needing an immunization from the selected series will be included. For example, checking the DTaP box and entering a 4 in the Dose Number box to the right will include only patients needing a 4th dose of DTaP. Likewise, checking the Varicella box and entering a 2 in the dose field, will include only patients needing a 2nd dose of Varicella. <u>Leaving the dose number field blank will</u> <u>include all patients needing any dose number in the vaccine series.</u>
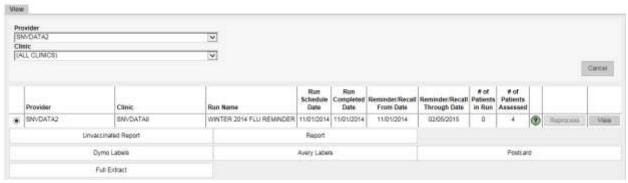
Step 6: Click on Create to run the Reminder/Recall.

Click on Create

A Reminder/Recall will run the following morning around 2:00 a.m. and is ready to review upon arrival to work that morning.

You can modify a report before the Reminder/Recall runs by clicking on View from the Reminder Run screen, then Update to apply the changes.

Step 7: Find the Reminder/Recall report the following morning.

The following morning, access the Reminder/Recall report by selecting Reports on the main menu bar. In the Patient Management section, select Patient Reminder/ Recall. Select the appropriate Provider and Clinic for whom you created the Reminder/Recall.
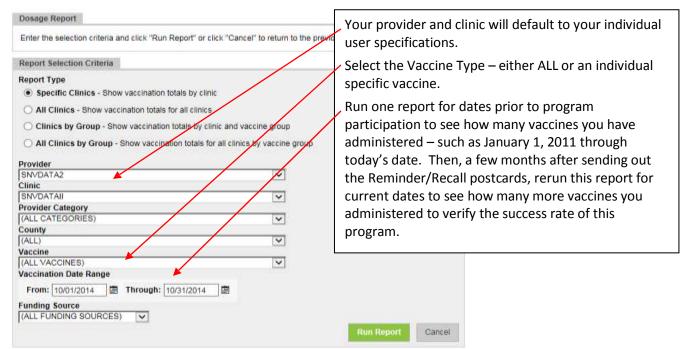

- **Unvaccinated Report** contains a list of patients who are overdue (recall) for vaccinations. The report details include; demographic information, contact information, the vaccine/dose the patient needs, past vaccination history, reminder date, and date of last vaccination.

- **Report** contains a complete list of all patients that need to be reminded/recalled for vaccinations. The report details include: demographic information, the vaccine/dose the patient needs, past vaccination history, reminder date, and date of last vaccination.

- **Full Extract** allows conversion into an Excel spreadsheet for further analysis.

- **Dymo Labels** allows printing mailing labels from a Dymo label maker.
- **Avery Labels** allows printing Avery 5160 labels for placement on envelopes or reminder cards (labels incorporate information as completed from the Demographics screen).
- **Postcard** allows formatted printing on postcards for mailing. Postcards are available at no cost to providers through Immunize Nevada at, www.ImmunizeNevada.org, however cannot be printed on – labels would attach for mailing.

Section 3: (Optional) Using The Dosage Report To Validate Program Success

The Dosage Report can be generated by going the **Main Menu**, select **Reports**, go to the **Coverage Statistics** section and choose **Dosage Report**.

Your provider and clinic will default to your individual user specifications.

Select the Vaccine Type – either ALL or an individual specific vaccine.

Run one report for dates prior to program participation to see how many vaccines you have administered – such as January 1, 2011 through today's date. Then, a few months after sending out the Reminder/Recall postcards, rerun this report for current dates to see how many more vaccines you administered to verify the success rate of this program.

This sample report generated totals for CPOX administered by age ranges and series number of the vaccine.